

# Managing Up: Working Better with Your Boss

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## The Bonner Community Engagement Curriculum

**BWBR Description:** *Bonner Curriculum workshop teaches participants strategies to better work with their supervisors, an important skill in leadership development.*

**Overview:** “Managing Up” is a term for describing how people can handle the people who manage them in order to create a dynamic and productive working environment. This session helps prepare volunteers and participants to take responsibility for the quality of their learning and experience by being active partners in working with their project managers, administrators or supervisors. “Managing Up” is a practice that fosters better relationships (especially between leaders and followers) and accountability in organizations and orients them towards the people who are served (in the case of service, the community). This workshop provides a fun overview of the concepts and an opportunity to apply them in practice.

Note: This workshop uses the Leadership Compass work styles, so that may be a good precursor to this workshop.

**Category:** People and project management; leadership skills; diversity

**Level:** Concept introduction can be suitable for all levels, but is especially helpful for project coordinators and those in middle- to higher-level positions



**Project  
Coordinators  
or Senior Year**

## Recommended

**Bonner Sequence:** This training is recommended for Bonner students as part of a Mid-Year or program retreat. It is also recommended for the senior year. It is a good follow-up to the Leadership Compass. It incorporates the same four work style (North, South, East, West) ideas.

## Learning Outcomes:

- Participants will feel more responsible for relationships with the people who manage them.
- Participants will have a sense of shared experience and language to describe ways to work better with peers and supervisors.
- Participants will have specific tools and strategies for “Managing Up” and for allowing other people that they manage or coordinate to do the same.

## Materials:

- Print or create flip charts for the 4 types, at end of trainer guide
- Flip chart prepped for plus/delta
- Markers
- 4 scenarios
- Handouts/examples
- Ground rules flip chart poster

## How to Prepare:

Familiarize yourself with the content of the module and create own examples to share in the presentation, examples that connect with the infrastructure and organization of your campus and programs.

## How to Do/Brief Outline:

This session is best as a follow-up to Leadership Compass. The outline below is for a 1 hour workshop. The session has the following components:

- |                                   |                           |
|-----------------------------------|---------------------------|
| 1. Welcome and Introduction       | suggested time 5 minutes  |
| 2. Overview of Four Types         | suggested time 10 minutes |
| 3. Small Group Work and Scenarios | suggested time 20 minutes |
| 4. Tools and Strategy Sharing     | suggested time 20 minutes |

### Part 1) Welcome and Introductions

Suggested time: 5 minutes

Facilitators will want to start by introducing themselves, the context for the session, and the intended outcomes. Then, you may also want to present some Ground Rules (below), so that people feel comfortable that this may be an opportunity for them to think about and talk about their working relationship with project managers/supervisors in a safe environment.

Present Ground Rules for the session:

- Respect and kindness
- Take responsibility for your own participation
- Anonymity
- Expect and give 100% from each person

### Part 2) Introduce Four Types

Suggested time: 10 minutes

In this section, you want to present the four types of managers. Explain that this the following examples are only of general character types, and that as such, of course they are reductive and one person will never only be one thing. Nonetheless, using a framework like this helps people to understand what style type they tend to use most and what style type the people they work with tend to exhibit. Note that the names here are intended to just paint a characterization of the type of style, and these styles are not gender-specific.

Type	Translation	Approach
<b>Susie So Nice</b> (based on South)	People Person	Fairness and good will
<b>Action Jackson</b> (based on North)	Go-to Person	Getting things done
<b>Peter Practical</b> (based on West)	Analyzer and planner	Thoroughness
<b>Betty Blue Sky</b> (based on East)	Idea generator	Big picture and vision

Have facilitators acting these types out, using the same scenarios: a person on the phone in the office, writing, working on the computer, working on a calendar, training plan, or a budget.

Suggested things to model:

Type	Modeling
<b>Susie So Nice</b> (based on South)	Emphasizing things based on relationship, people's values, "Oh this person hasn't been utilized yet." "Oh, I've got to call so-and-so" "Oh, so-and-so is doing such a good job"
<b>Action Jackson</b> (based on North)	Emphasizing things based on accomplishments and tasks, "We need to get these 3 priorities covered," "So-and-so will get that done the quickest," "Let's x that and put this in instead"
<b>Peter Practical</b> (based on West)	Emphasizing things based on logic, a thorough plan, "Each of the organizational values and competencies needs to have a session (or line item) associated with it," "For all of this to be accomplished, we will need to leverage additional resources totaling 40 person-hours," "This must be done before this."
<b>Betty Blue Sky</b> (based on East)	Emphasizing things based on big picture, vision, and strategy, "Look how this program thematically reinforces our organizational mission; each day needs to be centered on one distinct theme," "We should invite so-and-so to partner with us here as an entrée for working together in the future," "Oh, that's basically the same idea as that, but restated differently,"

Then, lead the group in briefly noting (on flip chart up front) the PROS and CONS they think that a person of that style would tend to exhibit:

Take only up to 5 pros and cons for each type, moving quickly.

- **South: "Susie or Sam So Nice":** Pros and Cons
- **North: "Action Jackson or Jill":** Pros and Cons
- **East: "Bill or Betty Blue Sky":** Pros and Cons
- **West: "Peter or Paula Practical":** Pros and Cons

### Part 3) Scenario Work

Suggested time: 15-30 minutes

Determine whether time allows you to have each small group respond to all of the styles or have separate groups cover 1-2 styles and then report out to the larger group.

Present the following general overview of the scenario to the whole group.

General overview: Everyone is working on the annual campus service day, and you are the point person. Your campus program has two full time staff, 3 project coordinators, and five juniors and sophomores who have volunteered for leadership roles on the project. The service day is two weeks away.

With this challenge in mind, how will you respond to the following scenarios relating to Managing Up effectively? Think specifically about what “tools” (e.g., email messages, advance meeting agendas, memos for broad distribution, meetings, orientations/training, etc.) will be most effective with each supervisor. Make sure you name these tools in your response.

**Susie So Nice:** For the service day, your project manager has agreed to do the following: call and confirm the kick off speaker (an old friend), get banners from the sponsors, pick up the supplies from the discount retailer in her truck, return call to local TV station for an interview, and follow up with the printers about when printed materials are coming. However, she hasn't come through yet. You're being held back and the clock is ticking. When you ask she says “Oh yeah, I'll get it right to you. You can tell she's stressed out meeting your needs and is behind on her own work. She won't ask for help, and she's starting to exhibit signs of exhaustion.

**Action Jackson:** You just had a 15-minute meeting with Action (after the previous two have been cancelled). You had prioritized your top 3 items from your now growing agenda and had high hopes of being able to get through these with Action. However, Action had another plan. He made a last minute request of you to write a press release on the service day that he could use at a campus advisory board meeting this afternoon. In the end you were left with 1) an extra product that will take most of your time today 2) no feedback on your current work products 3) a vote of confidence and a slap on the back “You're doing a great job. Keep it up! Can't wait to see the finished product.” You still really need a solid hour to get feedback on your plans, get answers to questions, and approval to take action. He's always busy, and your schedules always seem to be at odds. Although he is good on e-mail, you just want some one-to-one time in person.

**Betty Blue Sky:** You just had a 15-minute meeting with Betty (after the previous two have been cancelled). You had prioritized your top 3 items from your now growing agenda and had high hopes of being able to get through these with Betty, especially since she promised several days ago to help you on several pressing service day issues. However, she had another plan. Betty has a NEW IDEA! Last night she had a great meeting with the Mayor and now wants to change the theme the service day to reflect our new partnership with the city. You know this would mean changing the agenda to have the Mayor speak (in addition to the already confirmed speakers), changing the T-shirts, banners, press releases, and day-of-event program. It will also mean re-oriented all the volunteers to the new agenda and theme. Although her idea sounds interesting, you are three weeks into the current plan and two weeks away from the event.

However, you still need (or did before the new plan) the following from Betty: call and confirm the kick off speaker (an old friend), get banners from the sponsors, return call to local TV station for an interview, and follow up with national about when printed materials are coming. Not only are you waiting on these items, but you also need approval for your post service day time off for a family visit which you requested two weeks ago by submitting a form into Betty's box. Tomorrow is the last day to order tickets before a price hike.

**Peter Practical:** You meet with Peter every Monday from 11-12am. He requests that you submit an advance agenda on Friday with any attachments. Over the weekend at a service day you started talking with several volunteers about a great idea they had for a special community-building dance "Club Kids" area at the service day. It would have dancing and music (age appropriate) and children could earn entry by accumulating points at action stations. You are excited and the volunteers are willing to plan it. However, Peter seemed to dismiss the idea. You know there will be time to do it successfully. It will also be a great opportunity to give the student leaders a real sense of ownership over the day. Although this issue wasn't on your agenda for today, you decide to present the idea to Peter for sign-off, because next week will be too late! Peter was already annoyed last week when the meeting ran over due to a relationship issue regarding a sponsor and the publicity budget. You really want to see this happen.

## **Part 4) Tools and Strategy Sharing**

Suggested time: 15-30 minutes

Determine how you are going to run the report backs based on whether each small group did all or 1-2 of the styles. The basic process is to allow groups to present their thinking. For example, have each groups post their flip chart sheet with the response to

the scenario and tools they would use with the type of manager. Provide each group with roughly the same designated time for the report backs.

If you had a small group (especially in smaller workshop) do all of the styles, this can then lead into a more honest discussion of what style each person thinks they tend to exhibit, as well as the style of the immediate project manager.

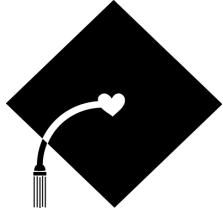
Act as a facilitator to draw out the similarities and distinctions in the approaches that would be effective. You can draw on the Leadership Compass handouts (especially the section on How to Work With) for help.

### **Part 5) Closing Discussion and Evaluation**

Suggested time: 5-10 minutes

Finally, you will want to wrap the workshop with some open discussion about what people learned and how they will apply this information to their own work.

End with a plus/delta or other workshop evaluation.



# Managing Up: A Look at Four Types of Manager/Leader Styles

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# Facilitator's Resource

This is an example of the type of information that each side should generate in thinking of how to work with a manager with a particular work style

## South / "Susie or Sam So Nice"

- Offer or take initiative with a specific task
- Make a joint planning calendar
- Articulate your tasks and needs
- Connect tasks to your needs
- Face-to-Face meetings/personal contact
- Prioritize tasks
- Constant Review/Check-off/Affirmation
- Provide warm feelings and praise; "stroke" and validate feelings
- Debrief and assess her situation and sympathize
- Review commitments and reassess
- What is feasible?
- What can I do to help?
- What can I take over entirely?
- Set Clear, Specific expectations
- What by when
- Check in and follow up plan

## North / "Action Jackson or Jill"

- Find a common time for a meeting with Action. Catch him early in the day before things have piled up and your time gets bumped.
- Think about using email for short items that don't need face to face time
- Always use an agenda, get it to him ahead of time and plan for short to the point meetings. Let your agenda give a lot of information- write your questions, lay out options, list pros/cons. Action will come more prepared and able to move through the items in a shorter time.
- Get him out of the office for important meetings and discussions where he can't be distracted by others, the phone, email etc. Go get coffee, run an errand together and talk on the way
- If Action likes email it can be a great tool for communication, flag issue, pose questions, lay out intended plans in text, and then follow up in person
- Find another person to utilize as your sounding board ñ Action won't be very available for LONG sessions
- Present Action with the main, crucial points and what you need to get it done.
- Don't take missed meetings, short answers etc. personally - its not.

- Give feedback via written materials.
- If you have Action's confidence, often he's happy to have you move forward without lengthy discussion on the matter. Give him updates, project your path and indicate, "This is what I'm going to do unless I hear differently from you."

### **East / "Bill or Betty Blue Sky"**

- Try to get a good assessment of the urgency or importance of an idea. Is it something to think about, or a good idea for the next time? If so don't stress about it. Play with the idea and develop it a little more.
- If the idea is more urgent and Betty wants something done about it now - figure out what the main point is ñ you may be able to work that central idea into the current plan, or see if there are aspects of the idea that can be easily and logically incorporated. If the idea is BIG and NOW but is a hard fit for the current plan see some of the steps below.
- Set up time for follow up to bring ideas, questions, and reality check
- When faced with a new idea that negates the last one, restate the original plan and WHY it was selected.
- Often the IDEA really turns Betty on, it could be implemented any number of ways. Find out if there's a PLAN with the idea.
- Get the East to commit to dates and times and write them down. However, don't rely solely on paperwork and notes ñ Betty usually prefers human interaction
- Work on a compromise. Don't nag; provide concrete benchmarks that YOU will do to motivate them to get it done
- Don't burst his/her bubble, resist rejecting ideas quickly. Validate ideas, let them simmer, play with them.
- Sometimes just say "no" however doing so immediately is not the best strategy
- Stress commitments that we've already made and work already completed
- Rethink and articulate work load, sometimes Betty has no idea what it would take to do something fully
- Cover important and/small items at the beginning of meetings instead of the end.
- Take care of your needs too, don't run yourself ragged trying to implement every new idea. Its not always an appropriate solution to take on more work and abandon what you've already done or are currently doing.

### **West / "Peter or Paula Practical"**

- Leave a voice mail over the weekend to suggest or amend agenda
- Short memo on desk by 9 am (bullet idea and build your case)
- Have details planned out and show your work
- Be prepared for concerns and questions; have logic and rationale
- Bounce off a trusted co-worker

- Give notice or take initiative with short memos and e-mails
- Be prepared with ideas for policies and details
- Present in an organized fashion; don't waste time on how it "looks" as much as how it is structured
- Project confidence and personal commitment
- Modeling "non-Peter" behavior when necessary (it's okay to have opportunities for "ooh ooh I forgot" on agendas)